

AD-A117 686

LEADERSHIP AND MANAGEMENT DEVELOPMENT CENTER MAXWELL--ETC F/G 5/9
MANAGEMENT CHALLENGE FOR THE EARLY 1980'S.(U)
1980 J T IRWIN

UNCLASSIFIED

NL

For
58/100



END
DATE
FILMED
8-82
DTIC

2

AD A117800

Student Report

Copy available to DTIC does not
permit fully legible reproduction

DTIC
ELECTE
AUG 5 1982
S H D



DISTRIBUTION STATEMENT A
Approved for public release;
Distribution Unlimited

AMERICAN MANAGEMENT DEVELOPMENT CENTER
UNIVERSITY OF MICHIGAN LIBRARY

82 08 05 072

DTIC

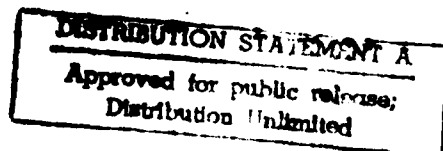
[illegible]

DISTRIBUTION STATEMENT A

Approved for public release;
Distribution Unlimited

✓
SUMMARY

The USAF has a substantial loss of experience which is not being replaced as fast as management might desire. This situation can be overcome through complementary training policies. First, continue to pursue established training methods. Since course demand exceeds supply, other procedures are required. Secondly, pursue an unconventional form of training that involves a team of experts and trainees--personnel detailed to an organization as a rotational team of working consultants. They would train the organization's resident incumbents and accomplish certain assigned tasks. Upon completion of the task, individual team members (analyst or trainee) could be selectively retained in the "visited" organization. This method of work training will integrate orientation and overview training, formal classroom instruction, on-the-job training, and further implement the Resource Management Team concept within the Comptroller Community. This training process could be used in various other USAF disciplines, however, it may offer the greatest pay-off in the larger or "matrixed" Comptroller organizations. Benefits should accrue to both the individual team member and the government in improved morale and better Resource Management.



Accession For	
NTIS GRA&I	<input checked="" type="checkbox"/>
DTIC TAB	<input type="checkbox"/>
Unannounced	<input type="checkbox"/>
Justification	<i>Per Form 182</i>
By	<i>[Signature]</i>
Distribution	
Availability Codes	
Dist	Avail and/or Special
A	

BIOGRAPHICAL DATA

NAME/RANK/SERVICE: JOSEPH T. IRWIN, MAJOR, USAF

PMCS CLASS: 80-A

PAPER TITLE: MANAGEMENT CHALLENGE FOR THE EARLY 1980s

CURRENT POSITION: CHIEF, FINANCIAL MANAGEMENT GROUP
PLS/RPV SPO, PROGRAM CONTROL DIVISION

CURRENT DUTY ADDRESS: ASD/SD26P
WRIGHT-PATTERSON AFB, OHIO 45433

CURRENT DUTY AUTOVON NUMBER: 785-5339/5981/2428/6213

PREVIOUS PUBLICATIONS: NONE

INDEX

BACKGROUND	1
RECOMMENDATION NUMBER 1	3
RECOMMENDATION NUMBER 2	6
SPECIFIC SUGGESTION	6
APPLICATION	6
OTHER APPLICATIONS	6
DISCUSSION	7
EXAMPLE OF APPLICATION AND TEAM COMPOSITION	8
TEAM MEMBERSHIP	9
OTHER CONSIDERATIONS	10
SUMMARY	12

MANAGEMENT CHALLENGE FOR THE EARLY 1980s

Have you noticed an increase in the number of retirement/PCS luncheons in your organization lately? Have you seen any new second lieutenants or civilians attending meetings and working in the various organizations?

The USAF is currently experiencing an unusually large loss of personnel and their experience. The problem is not a brain-drain--it is an experience drain. The losses are especially acute in the professional/technical skills. I believe the greatest challenge to management during the first half of the 1980's will be to develop the policies and procedures to overcome this adverse trend and to train and replace the required experience as quickly and completely as possible.

It is my opinion that new training concepts must be developed and implemented to augment those currently available.

BACKGROUND:

There are several reasons for the decline in experienced military officers. The rated supplement in the Comptroller Career Field has declined from a high of 210 in FY 1977 to 23 in FY 1980, reference Attachment 1, Table 3. Officer "levies" to other career fields (missiles, BMTS Instructors, ROTC, etc.) will require an increase from 26 in FY 1979 to 41 in FY 1980, reference Attachment 1, Table 4. Transfers, cross-training, retirements, and separations will reduce the remaining military base of experience still further.

Consider these USAF Officer Military Manning Statistics for the Comptroller Career Field: (Reference Attachment 1, Table 1)

<u>RANK</u>	<u>AUTHORIZED</u>	<u>%</u>	<u>ASSIGNED</u>	<u>%</u>
LT	210	15	557	38
CAPT	583	41	423	29
MAJOR	336	24	307	21
LT COL	<u>281</u>	<u>20</u>	<u>177</u>	<u>12</u>
TOTAL	1,410	100%	1,464	100%

(Note that the percentage assigned by rank for the Comptroller Career Field very closely approximates the equivalent USAF percentage.)

Meanwhile, the civilian workforce that has always provided "continuity" (which included substantial on-the-job training and guidance to the young military member) is retiring in significant numbers. This is attributed to the World War II Veteran/Government Employee reaching retirement age.

Therefore, it is my conclusion that the situation in total is worse than the preceding military officer manning statistics suggest. I believe we have a training problem and offer two suggestions which I believe are synergistic when applied together.

RECOMMENDATION NUMBER 1:

Maximize what is already in being. It is my opinion that we are doing a good job in the current training programs. However, we must question and enhance each course on a continuous basis. While we cannot achieve perfection, we must continue to try.

Selection for formal training should be on the basis of employee retention and potential and organizational need. There should be a matrix mix of both civilians and military and mid-level and junior managers in attendance. The newly formed "Palace Dollar Team" for civilians may assist in this regard.

After selection has been made for course attendance, excusal should not be approved except in the rare case of personal emergency. Alternates should be available or the excusal granting authority should be required to furnish a substitute.

Individual civilian and military training plans should list the required career courses. This should include on-the-job and off-duty personal training or enrichment. Training plans must integrate with cyclical organizational work loads and courses should be in a logical sequence with reflective work time scheduled between courses.

Training plans should reference specific training requirements and objectives that have been published by management. "Attendance required at X training course" or "Increases career potential" statements are too general. The specific skills that are required to advance in the training program or

will be required for competition at the next level should be clearly stated. Examples of these requirements have been published by the AFSC Aeronautical Systems Division (ASD) Comptroller Organization for assigned officers and civilians. (Reference: Attachment 2, Comptroller Policy Letter No. 29, dated 8 March 1979, Subject: ASD/AC Officer Career Guidance Program; Attachment 3, Progression Guide for Comptroller/Financial Management Personnel; and Attachment 4, Financial Management Training Progress Report.) Comptroller Policy Letter No. 29 establishes the training and source references for all newly assigned Lieutenants and Captains. The Progression Guide for Comptroller/Financial Management Personnel is used primarily for civilian employees, but does include "comparable military ranks." The Financial Management Training Progress Report may be used to document the type and level of orientation training for military or civilian employees. It is noted that these are excellent and comprehensive examples of what is required. However, they appear to be somewhat fragmented in application, lacking in integration, and potentially short of supervision in implementation/follow-up.

.- We should operate the currently available comptroller training courses at their maximum effective strength. (These are generally ATC, AU, or AFIT courses which are located at Sheppard AFB, TX, Maxwell AFB, AL, or Wright-Patterson AFB, OH, respectively.) Consideration must be given to faculty/student ratios, classroom/homework hours, material to be covered, time available, location, and cost of operation.

We should revise current courses, adding new material as required and delete that which is obsolete. I believe an appeal to the field for new material, subjects or course suggestions through AF Periodicals and command channels would be productive.

Adapt and use the latest teaching techniques: Real time/remote television seminars, video recorded materiel, computers and basic programming, programmed learning aids, case studies, and seminars. (AFLC, in conjunction with AFIT, is currently conducting courses at distant locations with closed circuit television. The transmission originates at Wright-Patterson AFB, OH.)

Finally, we should stress conceptual learning rather than factual memorization. The goal is to teach the student how to identify the problem, where to find the appropriate reference material (regulation), and when to solve the problem or request expert assistance.

RECOMMENDATION NUMBER 2:

Explore and implement innovative and novel educational techniques in the work place that will "close-the-loop" between traditional classroom education and on-the-job training. The exact methods and procedures would depend upon the inherent mission and organizational structure, however, I will offer a specific example.

SPECIFIC SUGGESTION: Form a "Resource Management Tiger Team" (RMT²) of 5 to 9 persons and assign them to a task or work area for a specific, but limited, amount of time. Upon expiration of the term and/or completion of the task, the team would move, leaving certain members in the assisted or newly established organization. (Either fully qualified or trainee employees could remain, depending upon the desires of management.) Selection of replacement team members would be accomplished and the process repeated.

APPLICATION: This training process could be more easily implemented in a large Comptroller Organization, such as the Product Divisions of AFSC, reference Attachment 1, Table 2. (It is noted that teams are currently being used for Independent Cost Studies and Analysis, Source Selections, Cost Panels, and Cost/Schedule Control System Criteria Validations.) However, I recommend a wider and more Comptroller oriented team that is directed to assist the Program Control Division in the System Program Office.

OTHER APPLICATIONS:

This training/worker team concept could also be adapted

and used to enhance field training by MAJCOMS, such as in establishing WARSKIL training teams. (Munitions load crews, munitions maintenance teams, rapid runway repair, or base security defense teams are prime candidates.) Other potential career field applications include: civilian and military personnel; manpower; transportation; security police; aircraft maintenance; supply; civil engineering; logistic/operational plans; services; etc. However, for purposes of further discussion, I have limited the subject to the very large Comptroller organization.

DISCUSSION: It will be impossible for everyone to individually receive in residence the training courses they require. Historically, we have never been able to train everyone in residence. Besides the increased training positions not being available, TDY funding will surely not support such quantities of travel. Additionally, the average organization cannot afford the trainees' absence--even though they may be only marginally productive due to their limited experience. From the organization's point of view, "any level of productivity seems better than nothing."

EXAMPLE OF APPLICATION AND TEAM COMPOSITION:

RDT&E and Production efforts in AFSC always require some form of documentation. The complete documentation of all of a system's associated acquisition cost is currently called a "Blue Book." It contains a very complete narrative description of the weapon system and its subsystems, their relative interdependence, and their relative importance. It specifically defines all of the known pieces, including: assumptions, methods, schedules, relationships, and all the other factors that will consume financial resources. In general, it is a descriptive source reference and an administrative coordination document.

The average "Blue Book" requires 30 to 180 days to produce--depending upon the experience of the Cost Estimator, the availability of other full-time human resources, and the complexities of the weapon system being estimated. When published, the "Blue Book" becomes the reference point from which all future changes and comparisons are made. This requires that all budgets, briefings, or resource plans be directly traceable to the original documentation. Under the best of circumstances, the cost track from the "Blue Book" to the current estimate--with intermediate stops for budgets and reports--is a very complex, difficult and continuous task.

If the task were to produce a "Blue Book," a team could be formed and assigned the task. Personnel could include: a fully qualified cost estimator and a trainee; a fully qualified

budget analyst and trainee; a fully qualified management/cost analyst and trainee; and an administrative clerk.

Mission tasking would be as follows: The cost estimator and trainee would derive the estimate and document it in the "Blue Book." The budget analyst and trainee would prepare the budget--sourcing the system's quantity and cost requirements from the "Blue Book." The management analyst and trainee would prepare the program's acquisition schedule of major milestones. If required, the management/cost analyst could also initiate any contractually required cost control and reporting systems. The administrative clerk would establish the file plan and provide support to the team. Thus, all personnel would participate in establishing the management information system that is required to track changes from the original estimate to the new or current estimate.

Upon completion of tasking, the fully qualified team analysts would be returned to their source or continued in the same capacity in the next detail. The trainees could permanently stay and assist those personnel already assigned to the program office. They would be responsible for maintaining and updating the management information system which they had installed. This includes maintaining the "track" of changes between the "Blue Book" and the Budget Submissions and updating the scheduling system.

TEAM MEMBERSHIP: All team participants and management should recognize the potential for career enhancement through voluntary participation. A fully qualified employee must be selected as

team leader and each of the other analysts should be fully qualified in their respective disciplines.

Team membership is a teaching and learning experience by an elite group of professionals. Therefore, membership could be extended to AFIT, ATC, AU, AFA, or ROTC course instructors on that basis, depending upon their availability. (State-of-the-art problems and solutions could be identified and referred to resident students for further research and potential solution.)

The team is a detail from the Comptroller's Staff--a group of working consultants. In a matrix organization, team membership could offer mobility; enhance the probability of nomination to a full-time advanced educational degree program; or the chance to demonstrate one's native ability and potential. Volunteers should be accepted with the understanding that membership is on the basis of "best qualified."

OTHER CONSIDERATIONS:

There are potential intangible benefits using the working team training concept. It offers the means to standardize the most basic work methods and procedures in the various functional organizations. Further, it provides the means to crossfeed new techniques between organizations.

I believe that the team concept would alleviate part of the duplicative effort problem--commonly known as "reinventing the wheel." It would also offer the employees the opportunity to put additional quality into the quantity of work produced. The team should demonstrate what is expected and teach the

incumbents how to do it. It should place a full time qualified expert on the scene, rather than having a "quick sufficiency review" just prior to a major review or briefing. These intangible benefits should have a substantial and positive impact on employee morale.

Finally, the team should have a source of funds to purchase: the most modern office equipment, computer services support, TDY, and overtime. These funds should generally come from the "supported" or visited organization. With respect to overtime, trainees should be expected to work the same schedule as the analysts and they should receive overtime pay accordingly.

SUMMARY:

The USAF has recently suffered a substantial loss of experience which is not likely to be remedied as fast as management might desire. This adverse situation can be overcome through the initiation of two complementary training policies. Taken together, I believe they are synergistic.

First, I suggest that we pursue our established conventional training methods at the maximum effective level. However, since the demand for courses far exceeds the supply of slots available, this solution will require far too much time to obtain the desired objective.

Secondly, I suggest an unconventional form of training that involves a team of experts and trainees. These people would be detailed to an organization as a rotational team of working consultants. Further, these consultants would train the organization's resident incumbents and accomplish certain assigned tasks. Upon completion of the mission, which might include the installation of management information systems and procedures, individual team members (analyst or trainee) could be selectively retained in the "visited" organization.

This method of work-training will integrate orientation and overview training, formal classroom instruction, and on-the-job training. Also, it will further implement the Resource Management Team concept within the Comptroller Community.

I believe this training method could be used in various other USAF disciplines and career fields. It may, however,

offer the quickest pay-off in the larger or "matrixed" Comptroller organizations.

The greatest benefit of immediate training will be in more effective Resource Management. Besides benefiting the government, benefits to individual participants could include: additional work involvement; responsibility, competition, and status; career progression; learning/teaching experience; and improved morale as the quality and quantity of work improve.

Table 1:

COMPTROLLER CAREER FIELD MANNING*

	<u>Auth</u>	<u>Asgn</u>
Lt	210	557
Capt	583	423
Major	336	307
Lt Col	<u>281</u>	<u>177</u>
Total	1,410	1,464

(Overall USAF percentages are very nearly equal to those above.)

Table 2:

DISTRIBUTION OF CAPTAINS AND LIEUTENANTS BY MAJCOM:*

	<u>SAC</u>	<u>TAC</u>	<u>ATC</u>	<u>MAC</u>	<u>AFSC</u>
Asgn Lt	72	68	37	37	143
Auth Lt	19	28	9	15	67
Asgn Capt	50	39	34	33	64
Auth Capt	50	50	40	39	103

* All USAF Military Officer personnel statistics contained herein were obtained from AFMPC Palace Dollar (Major G. Payne) and were current as of 8 February 1980.

Table 3:

RATED SUPPLEMENT PERSONNEL IN THE COMPTROLLER CAREER
FIELD BY FISCAL YEAR*

	<u>FY77</u>	<u>FY78</u>	<u>FY79</u>	<u>FY80</u>
Capt	95	61	20	8
Major	47	31	15	3
Lt Col	<u>68</u>	<u>58</u>	<u>34</u>	<u>12</u>
Total	210	150	69	23

Table 4:

LEVIES: (REASSIGNMENTS FROM COMPTROLLER TO OTHER CAREER FIELDS)*

FY 1979	26
FY 1980	41

* All USAF Military Officer personnel statistics contained herein were obtained from AFMPC Palace Dollar (Major G. Payne) and were current as of 8 February 1980.

OFFICER ORIENTATION PROGRAM

ACP STUDY GUIDE

1. REQUIRED READING:

- a. All ASD/AC Policy Letters
- b. ASDR 30-2
- c. BMS Regulation
- d. BMS Development Plan and Specification
- e. AFR 23-8; AFSC Organization and Mission
- f. AFR 23-6; AFTEC Organization and Mission
- g. AFR 30-1; Air Force Standards
- h. AFR 30-30; Standards of Conduct
- i. AFR 35-10; Dress and Appearance
- j. AFR 36-1; Description of primary and duty AFSC's only
- k. AFR 70-1; Do's and Don't's of USAF-Industry Relations
- l. AFR 70-15; Source Selection
- m. AFR 80-1; USAF R&D
- n. AFR 80-2; R&D Documents
- o. AFR 80-14; Test & Evaluation
- p. AFR 205-1; Security
- q. AFR 310-1; Data Management
- r. AFR 800-2; Acquisition Management
- s. AFR 800-5; SAR Reports
- t. AFR 800-7; ILSP
- u. AFR 800-9; Production Management
- v. AFR 800-10; Multi Service Programs

- w. AFR 800-11; Life Cycle Costs
- x. AFR 800-17; WBS
- y. AFR 800-18; FMS
- z. AFSCR 23-3; ASD Organization and Mission
- aa. AFSCR 70-11; Management Control System
- bb. AFSCR 80-8; Unsolicited Proposals
- cc. AFSCR 80-36; Mission Area Overviews
- dd. AFSCP 800-3; Program Management
- ee. AFSCR 800-1; Reviews
- ff. AFSCR 800-2; Program Management
- gg. AFSCP 800-6; SOW Preparation
- hh. AFSCR 800-7; Configuration Management
- ii. AFSCR 800-18; JOTR
- kk. ASDR 23-1; ASD Staff Organization and Mission
- ll. ASDR 70-2; Business Strategy Panels
- mm. ASDP 800-1; Management Systems
- nn. ASDP 800-7; Source Selection
- oo. ASDR 177-3; MAS

2. SEMINAR SESSIONS:

- a. Military Personnel System
- b. OER Explanation
- c. ASD/AC Matrix Management
- d. SPO Organization and Operation
- e. Program Control Functions
- f. Career Progression
- g. Acquisition Management Process

3. VISITS AND SPECIAL EVENTS:

- a. Attend a PAR/CAR briefing to ASD/CC
- b. Attend a PMR
- c. Attend an ASD Staff Meeting
- d. Attend an AC Staff Meeting
- e. Attend a MUC Meeting
- f. Visit the Computer Center
- g. Attend a FMR

CPL 29
COMPTROLLER
AERONAUTICAL SYSTEMS DIVISION
Wright-Patterson AFB, Ohio

8 March 1979

POLICY LETTER NO. 29

ASD/AC OFFICER CAREER GUIDANCE PROGRAM

1. PURPOSE: To provide a structured training and orientation program for officers who are new to the systems acquisition business and to ASD.

2. SCOPE: This program is applicable to all officers including:

a. All first duty assignment Second Lieutenants.

b. All Lieutenants and Captains who are on their first assignment to AFSC.

c. All Lieutenants and Captains with previous systems acquisition experience who are new to the Program Control function.

d. Higher grades on a selective basis as determined by ACP.

3. ORIENTATION: New officers will be given a 5 to 8 working day orientation assignment consisting of the following:

a. ACP orientation (2 - 3 days)

(1) Clear in through ASD/DPM, CBPO, and ACPS.

(2) Welcome and initial orientation briefing by ACP.

(3) Welcome and general discussion with ASD Comptroller.

(4) Systems Acquisition process briefing and discussion.

(5) Business Management System briefing and discussion (visit to ASD Computer Center).

(6) Training Program familiarization and initial screening.

(7) Matrix management familiarization.

b. ACB Orientation (1 - 2 days)

(1) The DOD programming and budgeting system.

(2) The Program Review process.

(3) Program financial management.

(4) Foreign Military Sales

(5) Accounting and Finance orientation visit.

c. ACC Orientation (2 - 3 days)

(1) Cost estimating methods and cost library orientation.

(2) C/SCSC system for evaluating contractor performance.

(3) The ICA process.

(4) Source selection procedures.

Upon completion of assignment in ACC the officer will report to his home office chief for initial collocation assignment.

4. ORIENTATION OBJECTIVES: During the orientation program the officer should meet all the key personnel on the staff and learn the location of their offices so that future contacts are facilitated. The officer should understand the basic principles and procedures of the subjects covered to form a basis for deeper understanding during on-the-job training.

5. INITIAL ASSIGNMENT: The new officer will be dedicated to a program office for a 12-18 month period by his home office. The home office chief will introduce the new officer to his senior collocate. The new officer's supervisor in his initial assignment will be responsible for:

a. Orientation to the program office.

b. Structuring a formal training plan for the officer in cooperation with ACPS.

c. Providing work assignments which contribute to the growth of the new officer's skills.

d. Periodic counselling of the new officer.

6. FORMAL TRAINING:

a. Within 60 days after initial assignment the new officer's home office chief will counsel him on formal training and prepare a recommendation for formal training listing the courses that the officer should attend during the next year. The supervisor will review the plan with the officer, coordinate any changes with the home office chief, and schedule the officer for a training interview with ACPS.

b. ACPS will review the home office and supervisor's recommendations and discuss course availability with the officer. ACPS will resolve any issues on formal training and schedule the officer for the recommended courses in coordination with the supervisor.

7. SECOND ASSIGNMENT:

a. After 12-18 months on the initial assignment the new officer will be evaluated by the home office for reassignment. The purpose of this evaluation is to determine the types of job experiences are required to further broaden the officer's skills and capability.

b. The officer will not remain in the initial assignment unless the home office is convinced that the required career broadening experience can be provided by reassignment within that program office or growth of his present position.


c. Reassignments to be considered include; SPO to Staff, large SPO to small SPO or vice-versa, single product SPO to basket SPO or vice-versa.

d. The desires and goals of the individual will be considered in this process. The supervisor and home office chief will hold counselling sessions with the officer prior to finalizing any reassignment. Reassignments will be on a collocated basis instead of dedicated.

8. FOLLOW-ON ASSIGNMENTS: The home offices will conduct follow-on assignment counselling with each officer ten months prior to the officer's expected PCS date. This counselling will insure that the officer has updated his AF Form 90 and provide advice on the suitability of various follow-on assignments for the individual concerned. The home office

will assist the officer in contacting the various personnel agencies to secure a suitable assignment.

9. TRAINING PLANS: Each home office will develop a model training plan for each AFSC assigned to that home office. This plan will serve as a guide for collocated supervisors and the officers themselves in planning their training programs. These model plans will be approved by ACPS prior to publication.


ROBERT L. ZAMBENINI
Colonel, USAF
Comptroller

1 Atch
ACP Study Guide

PROGRESSION GUIDE FOR
COMPTROLLER/FINANCIAL MANAGEMENT PERSONNEL

1. PURPOSE

The purpose of this guide is to:

- a. Establish required development milestones for evaluation criteria; and
- b. Provide a training "roadmap" for career development planning.

2. COVERAGE

- a. Employees who occupy positions at the GS-5 through GS-11 levels in the following series:

- (1) GS-345
- (2) GS-501
- (3) GS-560

- b. Military personnel of comparable grades/AFSC.

3. SCOPE

- a. In accordance with applicable training plans/agreements, individual development will be evaluated at grades GS 5, 7, 9, and 11 on development milestones in the following areas:

- (1) On-Job-Training (OJT).
- (2) Formal Mission Essential Training.
- (3) Individual Self-Development.

- b. Development milestones for each grade level are shown in Paragraph 4 below. To advance, an employee must have:

- (1) Completed the required development milestone, or
- (2) Completed an approved equivalent course/OJT activity, or
- (3) Passed an equivalency test for a Mission Essential course, or
- (4) Received a waiver.

c. Except for established equivalency test, all course/OJT activity equivalency requests must be approved by the Chief of the functional area to which they apply or by the Comptroller. Submit such requests to the Training Coordinator (ASD/ACM) through the immediate supervisor. Mission Essential courses will be waived where there is clear evidence that the course was not available to the employer during the evaluation period and the training will be completed within the 12 months following promotion.

d. The requirements are not retroactive. If a given grade level was achieved prior to NOVEMBER 1979, it is not required to make up the respective development milestones for preceding levels; however, it is to one's benefit to do so. All other factors being relatively equal, the individual who has met all requirements will be more favorably considered for further advancement.

4. MILESTONES

Courses and activities listed below are considered Mission Essential because they allow the managers greater latitude in distributing our limited manpower resources to satisfy the ever-changing Comptroller/Financial Management workload. Supervisors may require additional courses/activities that are peculiarly job-related. These take priority and should be evaluated for eligibility as equivalents.

a. GS-5 to GS-7 Level (Entry/First-Year)

(1) On-Job-Training:

(a) Assist in the preparation of and attend a Financial Review, Budget Estimate Submission (BES), Program Objective Memorandum (POM), Blue Book.

(b) Attend an ASD Council Program Assessment Review/Command Assessment Review (PAR/CAR) "type" meeting (Including ASD/AC Pre-Brief).

(c) Attend a Two-Letter Program Management Review (PMR).

(d) Perform TDY at a Contractor's Facility.

(2) Mission Essential Courses: For most new employees entering Systems Acquisition Financial Management, the current training program does not include formal courses. Individuals may be assigned to courses based upon their background.

(3) Individual Self-Development: Most of the Mission Essential Courses have prerequisites that are, at least, beyond the High School level. Career Development plans should include those courses that would prepare one for future requirements.

b. GS-7 to GS-9 Level (Apprentice)

(1) On-Job-Training:

(a) Assist in the preparation of and attend a Financial Review - different type than first year.

(b) Attend PAR/CAR to ASD Council for organization to which assigned.

(c) Attend PMR of organizational assignment.

(d) Perform TDY at AFSC and Pentagon.

(2) Mission Essential Courses:

(a) ASD Acquisition Management Orientation Course - one week, or Fundamentals of Acquisition Management (FAM) - four weeks, half days.

(b) Financial Management in Weapon Systems Acquisition (SYS 227) - two weeks.

(c) Principles of Contract Pricing (QMT 170) - three weeks, or DOD Equivalency Test, or by correspondence.

(d) Introduction Quantitative Analysis (QMT 345) - four weeks, or DOD Equivalency Test.

(3) Individual Self-Development: To be competitive, undergraduate studies should include courses that are directly related to one's career development plan.

c. GS-9 to GS-11 Level (Intern)

(1) On-Job-Training:

(a) Perform additional TDY at AFSC and Pentagon.

(b) Routinely attend PAR/CAR and PMRs of organizational assignment.

(c) Participated in Cost/Schedule Control Systems Criteria (C/SCSC) Demo or Supplemental Contract Application Review (SCAR).

(d) Perform TDY at least one Aircraft and one Engine Manufacturer's Facility.

(2) Mission Essential Courses:

(a) Evaluation of Cost Schedule Control Systems (SYS 360) - 13 days.

(b) Contract Administration (PPM 152) - three weeks, or DOD Equivalency Test, or by correspondence.

(c) Introduction to Life Cycle Costing (QMT 353) - two weeks.

(d) Advanced Quantitative Methods (QMT 550) - four weeks.

(3) Individual Self-Development: Graduate courses that would put an employee in line for Long-Term-Full-Time training should be underway.

d. GS-11 to GS-12 (Journeyman)

(1) On-Job-Training:

(a) Participated in a source selection on cost panel (management panel if Program Analyst Trainee).

(b) Participated on Independent Cost Analysis/Independent Cost Estimate (ICA/ICE) Team.

(c) Participated in C/SCSC Surveillance Effort.

(2) Mission Essential Courses:

(a) Surveillance of Cost Schedule Control Systems (SYS 361) - two weeks.

(b) System Program Management (SYS 223) - six weeks.

(c) Advanced Cost and Economic Analysis (QMT 551) - four weeks.

(d) Life Cycle Cost Analysis (QMT 555) - five weeks.

(3) Individual Self-Development: Although an employee's over-all development is considered in competing for further advancement, the "tie-breaker" is often in this area.

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

Topics/Objectives	Level of Exposure				Comments
	None	Slight	Normal	Heavy	
<u>COST STUDIES/ESTIMATING</u>					
a. Parametric Estimates					
b. Estimating Relationships					
c. Regression Analysis					
d. Learning Curves					
e. Baseline Estimates (DCP)					
f. Detailed Cost Estimates					
g. Work Breakdown Structure					
h. Functional Cost Elements					
i. Direct/Indirect Costs					
j. Life Cycle Costs					
k. Design to Cost					
l. PIECOST					
m. Should Cost					
n. Independent Cost Analysis					
o. Sensitivity Analysis					
p. Risk Analysis					
q. Other (Specify)					

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

Topics/Objectives	Level of Exposure				Comments
	None	Slight	Normal	Heavy	
PROGRAMMING/BUDGETING					
a. Budget Guidance					
Annual Call					
Program Mgt Directive					
Program Mgt Plan					
USAF Program Documents					
Program Schedules					
FYDP/POM					
Other (Specify)					
b. Budget Preparation					
AF Form 1537					
AF Form 1538					
AF Form 1539					
AF Forms 801/802					
DD Form 1634					
T&E					
Mission Support					
c. Appropriations					
R&D (3600)					
Prod (3010)					
(3020)					
(3080)					
Modifications (P1100/2100)					
O&M (3400)					
Other (Specify)					
d. Supplemental Budget Request					
e. PEG/PRG					
f. Economic Escalation					
g. Other (Specify)					

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

Topics/Objectives	Level of Exposure				Comments
	None	Slight	Normal	Heavy	
FUNDING					
a. Authorizations/ Appropriations					
b. Apportionment					
c. Deferrals					
d. BA/PA's					
e. Redirected PA's					
f. Initiations (PR's/ MIPR's)					
g. Commitments (ACD, PO, PD's)					
h. Obligations (Con- tracts)					
i. Expenditures					
X Progress Payments					
X Invoices					
X Billings					
j. ULO Monitoring					
X Undelivered Items/ Service					
X Adjustments/Claims					
X Withholds					
k. Reimbursements					
l. Funding Policy					
X Incremental Funding					
X Waiver to Forward Fin.					
X Full Funding					
X Annual Funding (O&M)					
X T&E Funding					
m. Modification Funding					

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

[illegible]

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

Topics/Objectives	Level of Exposure				Comments
	None	Slight	Normal	Heavy	
<u>CONTRACTS</u>					
a. ASPR					
b. RFP Preparation/Review					
c. Statement of Work					
d. Cost Proposal					
<input checked="" type="checkbox"/> DD Form 633					
<input checked="" type="checkbox"/> DD Form 1921-1					
e. Price Analysis					
f. Fact Finding					
g. Negotiation					
h. Defective Pricing					
i. Source Selection					
j. Sole Source Procurement					
k. Contract Types/Risk					
<input checked="" type="checkbox"/> FFP					
<input checked="" type="checkbox"/> FPIF					
<input checked="" type="checkbox"/> CPIF					
<input checked="" type="checkbox"/> CPFF					
<input checked="" type="checkbox"/> BOA/T&M					
<input checked="" type="checkbox"/> Other (Specify)					
l. Contract Payments					
<input checked="" type="checkbox"/> Liquidations					
<input checked="" type="checkbox"/> Progress Payments					
<input checked="" type="checkbox"/> Withhold					
<input checked="" type="checkbox"/> DD 250 Acceptance					
<input checked="" type="checkbox"/> Overhead Renegotiation					
m. Contract Options					
n. Stop Work Order					

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI)

[illegible]

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

-Trainee (Last, First, MI)

[illegible]

FINANCIAL MANAGEMENT TRAINING PROGRESS REPORT

Trainee (Last, First, MI) _____

Topics/Objectives	Level of Exposure				Comments
	None	Slight	Normal	Heavy	
FINANCIAL REPORTING & REVIEWS					
a. Manhour Accounting					
b. Obl/Exp Forecasts					
c. Program Mgt Review (PMR)					
d. Qtly Financial Review					
X Prog/Proj Milestones					
X Fund Requirements					
X Obligation Status					
X ULO Status					
e. Program Reviews					
X DSARC					
X DAP/SAR					
X CAR					
X MAR					
f. Program Audits					
X Local Auditor					
X OSD					
X IG					
X GAO					
X Other (Specify)					
g. Program Progress Reports					
X DD Form 111					
X Other (Specify)					

DATE
FILMED
8-8